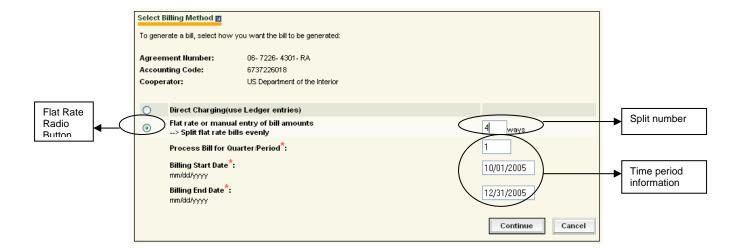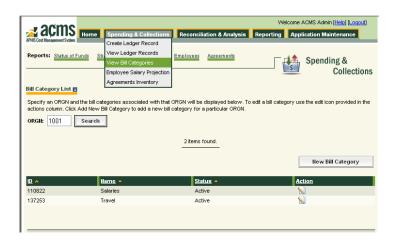## AGREEMENT BILLING – FLAT RATE

- Done with all the setup – now we can generate a bill.
- Click on "Generate Bills" button.
- Decide whether to use direct or flat rate charging.
- Let's use a flat rate for this example:
    1. Select "Flat rate" radio button
    2. Decide many ways we are splitting dollar allocation amounts – will divide amounts by that number. (1-12).
    3. Enter Quarter/Period for this Bill.
    4. Enter Start and End dates (freeform - not verified with quarter #).
    5. Click "Continue"

Select Billing Method

To generate a bill, select how you want the bill to be generated:

Agreement Number: 06- 7226- 4301- RA
Accounting Code: 6737226018
Cooperator: US Department of the Interior

○ Direct Charging(use Ledger entries)

Flat Rate Radio Button →
● Flat rate or manual entry of bill amounts
   --> Split flat rate bills evenly   4   ways   → Split number

Process Bill for Quarter/Period*:   1

Billing Start Date*:   10/01/2005
mm/dd/yyyy   → Time period information

Billing End Date*:   12/31/2005
mm/dd/yyyy

[Continue] [Cancel]

- Allows categorization of BOC ranges so bill lines are displayed as a name instead of BOC numbers.
- Bill categories are ORGN based – different categories for each ORGN.
- Bill Categories list page can be reached from "Spending & Collection" tab under "View Bill Categories" menu option.
    - Must be an Administrator to view or edit these pages.
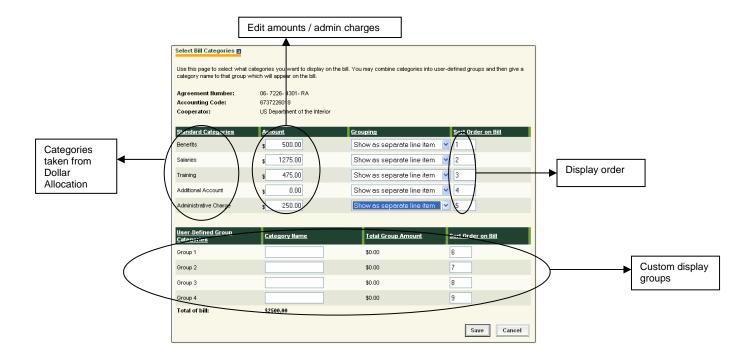
"Select Bill Categories" screen allows you to:
Verify and edit the amounts billed to any category.
Amounts and categories take from Dollar Allocation screen.
Verify and edit the Admin charges
Select order that categories will appear on bill.
Create custom groups from the listed categories.

Edit amounts / admin charges

Select Bill Categories

Use this page to select what categories you want to display on the bill. You may combine categories into user-defined groups and then give a category name to that group which will appear on the bill.

Agreement Number: 06- 7226- 4301- RA
Accounting Code: 6737226018
Cooperator: US Department of the Interior

Standard Categories	Amount	Grouping	Sort Order on Bill
Benefits	$ 500.00	Show as separate line item	1
Salaries	$ 1275.00	Show as separate line item	2
Training	$ 475.00	Show as separate line item	3
Additional Account	$ 0.00	Show as separate line item	4
Administrative Charge	$ 250.00	Show as separate line item	5

Categories taken from Dollar Allocation

Display order

User-Defined Group Categories	Category Name	Total Group Amount	Sort Order on Bill
Group 1		$0.00	6
Group 2		$0.00	7
Group 3		$0.00	8
Group 4		$0.00	9
Total of bill:		**$2500.00**	

Custom display groups

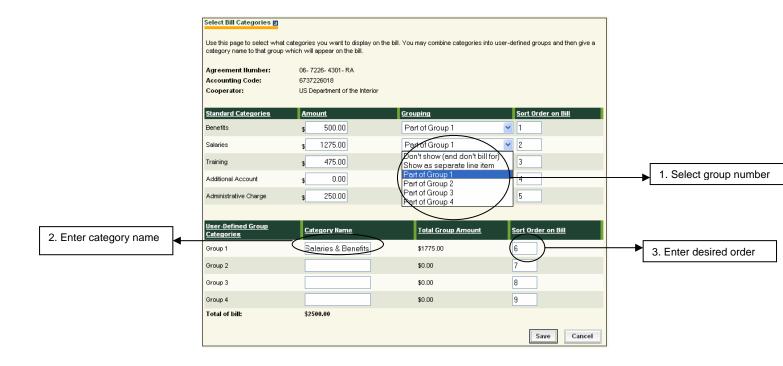Save   Cancel

To create custom categories:
In the "Grouping" dropdown, select a group number.
Enter "Category Name" for selected group number.
Enter order desired.
Click "Save"
In this example, "Benefits" and "Salary" are grouped into one custom "Salaries and Benefits" group.

Select Bill Categories

Use this page to select what categories you want to display on the bill. You may combine categories into user-defined groups and then give a category name to that group which will appear on the bill.

Agreement Number:	06- 7226- 4301- RA
Accounting Code:	6737226018
Cooperator:	US Department of the Interior

Standard Categories	Amount	Grouping	Sort Order on Bill
Benefits	$ 500.00	Part of Group 1	1
Salaries	$ 1275.00	Part of Group 1	2
Training	$ 475.00	Don't show (and don't bill for) / Show as separate line item / Part of Group 1 / Part of Group 2 / Part of Group 3 / Part of Group 4	3
Additional Account	$ 0.00		4
Administrative Charge	$ 250.00		5

1. Select group number

User-Defined Group Categories	Category Name	Total Group Amount	Sort Order on Bill
Group 1	Salaries & Benefits	$1775.00	6
Group 2		$0.00	7
Group 3		$0.00	8
Group 4		$0.00	9
Total of bill:	**$2500.00**		

2. Enter category name

3. Enter desired order

Save   Cancel

Last entry page: Free form text that is displayed on bill.
Billing Date: Defaults to today's date, but can predate it.
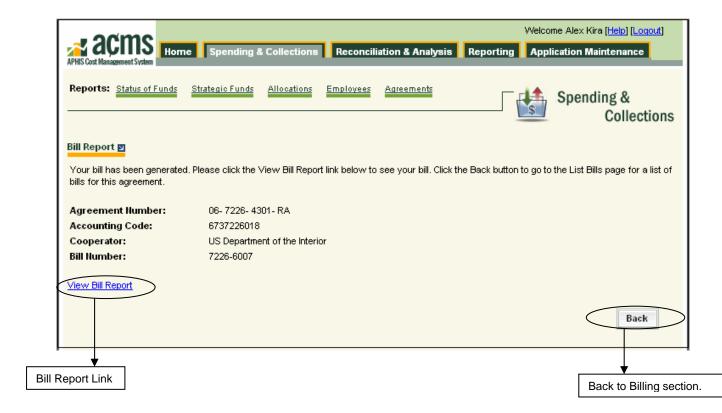Dates of Service: Free form text.
Special message to vendor: Schmooze box
Click "Continue" when done.

Billing Date and Comments

To specify the billing date and enter additional information such as comments, fill in the fields below and click save to save the information.

Agreement Number: 06- 9879- 98798- RA
Accounting Code: 5046001000
Cooperator: Akron-Canton Regional Airport

Billing Date*:   04/14/2006

Dates of Service:

**Special message to vendor
(will show up on bottom of
bill):**

Continue   Cancel

"Bill Report" page: Bill is complete.
Click on "View Bill Report" link to view copy of bill.
Click "Back" button on bottom to return to billing section.

Bill Report Link

Back to Billing section.

Bill Complete!